TimePunch

TimePunch Client 2.7

User Manual



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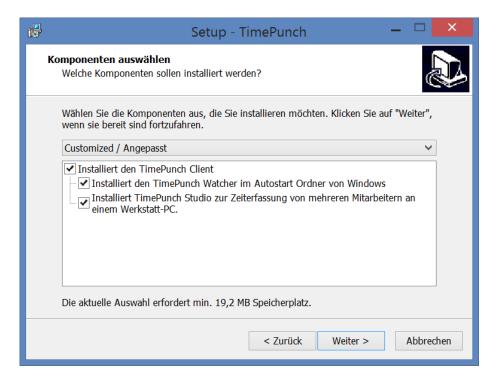
Introduction

This document describes the use of the TimePunch Windows client, the profile management and the holiday editor.

As further documentations there are user manuals of the TimePunch Watcher and the synchronization assistant available. Therefore this parts won't be described here at all.

Installation

The TimePunch Windows Client can be downloaded and installed from our Website http://www.timepunch.de. The installation will be done with our TimePunch Setup executable.



The following options can be chosen:

Option	Beschreibung
TimePunch Watcher Installation	Der TimePunch Watcher is used for the automatic time recording of the working time at the PC of the employee. It's most useful, if the people are working the most time at their PC.
TimePunch Studio Installation	TimePunch Studio is a software that runs at a standalone PC and can be used to track the logon and logoff times for multiple users.

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Product line

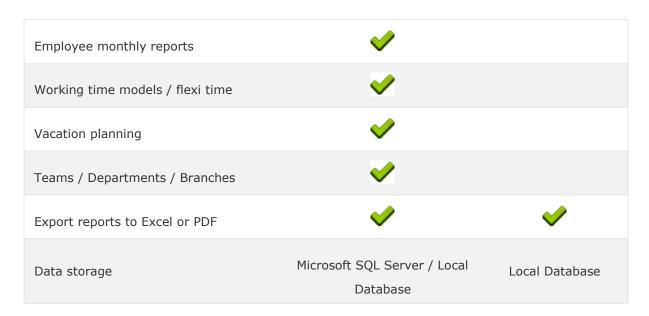
After the successful installation of TimePunch the product line selection dialog will be shown. Within the 30 days test period the product line can be switched in order to test the different versions of TimePunch.



In order to switch the product line, you have to select the menu "Help / Choose Product-line ..."

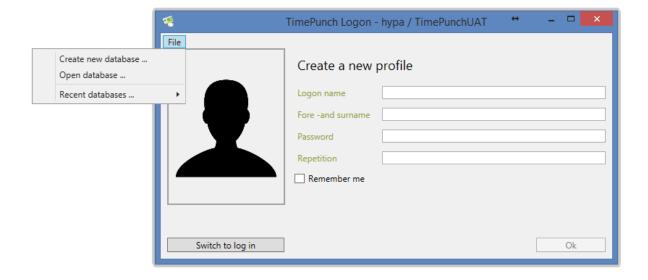


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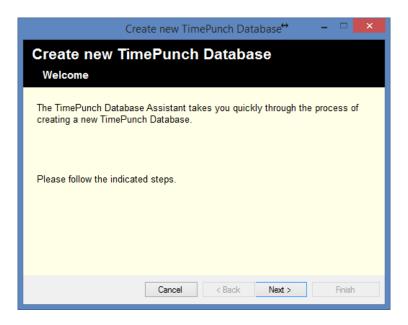
Creating a new database

After the first start of TimePunch there's no database in place. In order to use TimePunch it's therefore necessary to create a new database. That can be done within the Logon dialog by using the menu "File / create a new database ..."



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This opens a new assistant that leads the user through the necessary steps in order to create a new TimePunch database.



<u>Important:</u> Most times local databases gets created by this. If you plan to use TimePunch on a server, it's recommended to create and manage the database with the TimePunch Application Server. In this case the use of a Microsoft SQL Server or Microsoft SQL Server Express is mandatory.

The configuration of the Microsoft SQL Server is described in detail in the following document: http://www.timepunch.de/doc/TimePunch-SqlServer-1.0-en.pdf

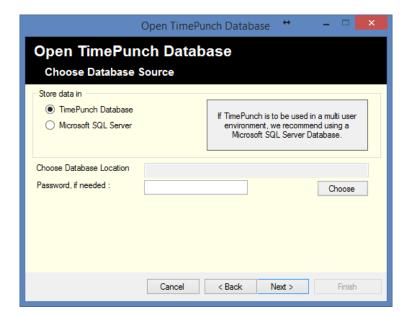
After the database has been created, a new staff profile for the user has to be created. This can be done with "Create a new profile"



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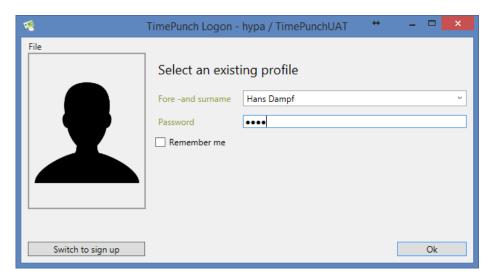
Make use of an existing database

At the same logon dialog it's possible to open an existing database. This might be a database that has been created at the server or by a different PC. Also at this point an assistant gets opened that leads through the process of opening the database.



After the database has been opened successfully, the user can logon with the logon dialog at TimePunch.

Therefore an existing profile can be selected or a new profile can be created.



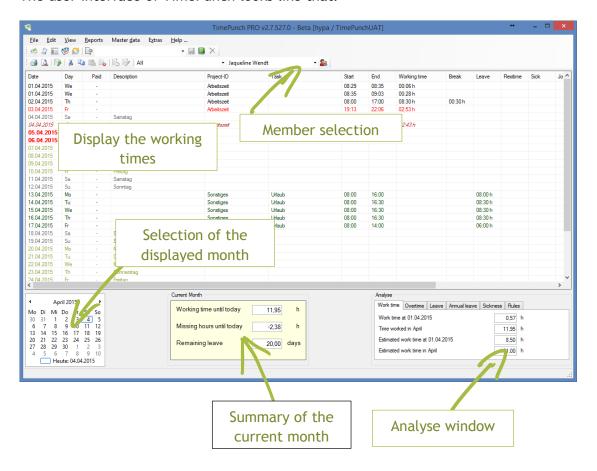
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Overview

The TimePunch client is used to manage the working times. Depending on the permissions and the product line, only the own working times or the working times of all staff members can be displayed.

User Interface

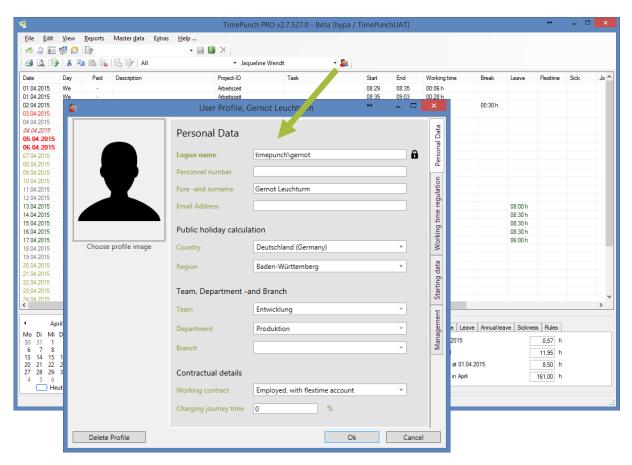
The user interface of TimePunch looks like that:



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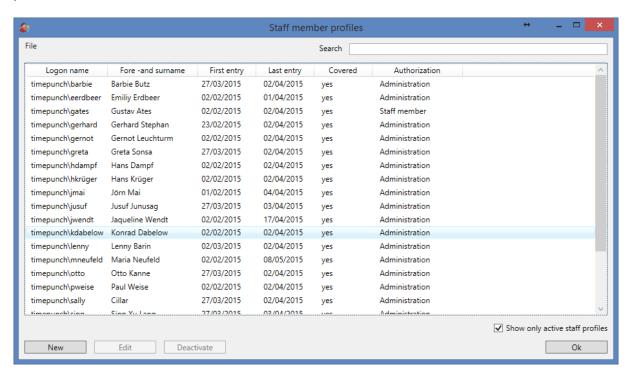
Staff member profile

The staff member must be selected via the member selection drop down in TimePunch PRO. After selecting the member a click to the staff symbol opens the staff member profile dialog.



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As an alternative the profiles can be management with "Master data / staff member profiles".



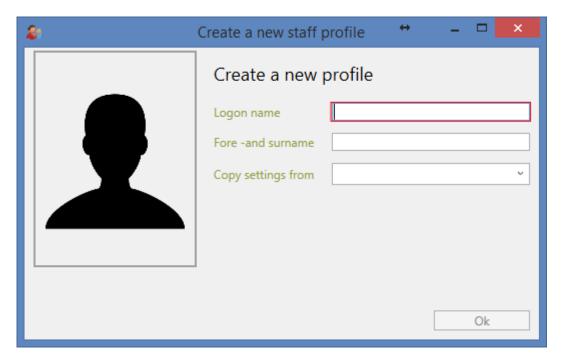
By using the "Edit" button or with a double click at the profile the dialog to manage the user profile gets opened. The dialog consists of four areas - the work contract, the working time and the starting data and the management.

<u>Important</u>: The column "Covered" shows if the member profile gets covered by the current user. Covered means not necessarily that the profile is editable by the user. It's more an indicator that the member is part of a group (e.g. Team / Department / Branch) that is managed by the user. Therefore the user is set as a group leader or assistant. The effective rights are derived by the permissions of the current user.

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Create a new staff member

By using the button "New" a new staff member can be created in TimePunch. Therefore the logon and the fore -and sure name of the staff member is necessary.

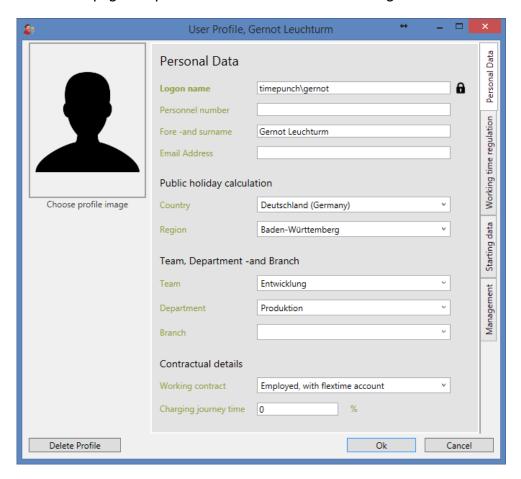


By using the selection list "Copy settings from" an already existing profile can be selected. If a profile has been selected, the working time model, the public holiday settings and flexi time account rules will be copied. This saves a lot of time when creating the initial member profiles.

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Personal data

At the first page the personal data of the staff member gets defined.



The personal data consists of the logon name, the personnel number, the fore -and sure name and the email address of the user. Additionally the base for the public holiday calculation can be defined.

The team, department and branch selection defines the membership in the distinct groups. The groups can be managed in the Master data menu of TimePunch.

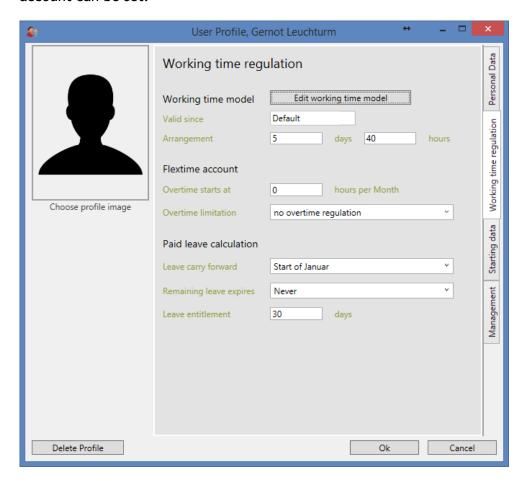
At last the contractual details can be defined. At this point one can distinct between employed or self-employed, which means that in the first case a flexi time account will be created and in the second case, only the time recording can be used.

<u>Important:</u> The Logon name can only be changed, if prior the security lock at the right border of the input fields has been unlocked.

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Working time regulation

At the second page "Working time regulation" the settings that applies to the flexi time account can be set.



<u>Important:</u> This data always refer to the current month the upcoming ones. If data shall be changed in previous months, e.g. the public holiday settings, then this needs to be done in the analysis field of the TimePunch main screen.

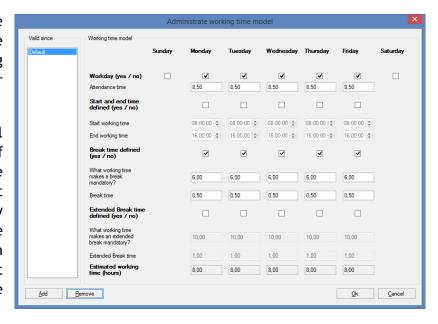
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Working time models

Using the button "Edit working time model" a dialog opens which can be used to edit the working time models.

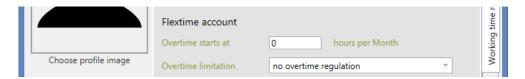
The default working time model will be used all the time, if no other working time model is available for the staff member.

A new working time model only needs to be created, if a member changes the contract from full to part time or vice versa. The new working time model will be used starting by the given date. Otherwise the default working time model will be used.



Flexi time account

At the flexi time account area the overtime calculation will be defined. At first this means the overtime that is compensated with the employee's contract. That means it can be defined from which amount of work it will be counted as overtime.



On request, the overtime can be limited per month or a total. This can be done with the second selection:

"Regulate accumulated overtimes" means that the employee can only have a limited overtime in total.

"Regulate monthly times only" means that the employee can only have a limited amount of overtime in month, but in total unlimited.

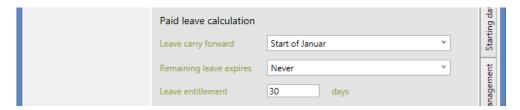
All working hours that are done beyond the limitation will be cut or paid out automatically, if the checkbox at "Overtime above the limit will be paid automatically" has been set.



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Paid leave calculation

In this area the details of the annual leave can be defined. First the month in which the leave carry forward takes place can be set. By default this is January, but each other month can be chosen also.



Second the date of expiration must be set, which is the time when the previous annual leave expires.

At the field "leave entitlement" the amount of leave that has been written in the work contract must be entered.

Starting data

At the third page the starting data of the staff member can be defined. The starting data consists of the overtime, the sickness days and the remaining annual leave of the employee.



Even if an employee starts during the year, the remaining vacation days need to be entered.

Example: The employee has an annual leave of 30 days, but starts in the companies in July. In this case, the 15 vacation days remaining for the first year need to be set as the starting data.

Similarly, if the employee has additional annual leave, this also needs to be entered in TimePunch.

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Management

At the last page "management" the authorization of the staff member can be defined, the license can be set and the logon password can be entered.



Authorization

In TimePunch there are different authorizations. The superior authorization includes the permissions of the minor authorization.

Administration → allows the management of all staff members

Human resources management \rightarrow allows the management of the assigned groups

Project management → allows the management of projects

Staff member in position of trust \rightarrow allows changing the own working times

Staff member \rightarrow allows the recording of the working time

In detail the authorization groups will be explained in chapter "Permission management / Permissions"

Licensing

The licensing defines how the user can make use of TimePunch. The description of the different licenses can be found at "Types of licenses in TimePunch".

Security Setting

The staff member can set their own password at this page. Alternatively the password can also be set by a member of the administration group.

<u>Important:</u> If the logon name gets changed, the password must be changed as well because of security reasons.

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The working time model in detail

TimePunch can handle a distinct working time model for each day in the week. The structure of the daily model is always identical for each day - as you will see.

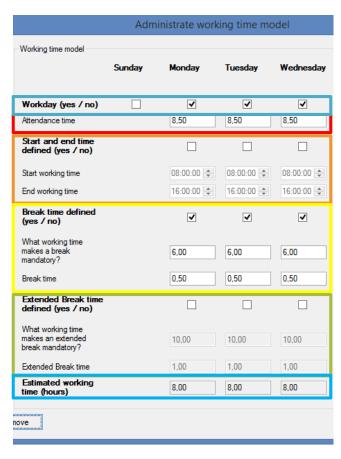
The checkbox workday (yes/no) defines, if the employee has to work at this day.

The attendance time consists of the target hours and the minimum break time. Setting the start -and end time does not influence the flexitime calculation and is only needed for documentation purposes.

By setting the minimum break time, one can define starting from the amount of working time if a break time will be enforced.

By setting the extended break time, a longer break can be enforced if the recorded working time exceeds the defined working time.

<u>Important</u>: The extended break is not a regular one and will therefore not counted to the target hours.



Import and export staff member profiles

Within the master data the staff member profiles can be imported and exported by using the menu called "File".

This happens mainly by importing and exporting CSV files. For the import it will be supposed that the first row contains the column title. The title defines the content of the column. The column order and completeness is not important as long the mandatory field "Logon name" is filled.

Hint: The easiest way to create an import template is to export a set of test data using "file / Export staff profiles" and save as CSV file.

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Employee Monthly Report

It's recommended to create a monthly report for the previous month when the new month starts. This report can then be attached to the personal employee files and can be used as a proof of the working time, flexitime and annual leave.

The report can be accessed by the menu "Reports / Monthly Report" in TimePunch PRO.

Monthly report for Jaque	eline We	endt 3/2015		04.04.2015
Fore -and surname	Jaque	eline Wendt		
Personnel number				
Working contract	empl	oyed		
Country	Deuts	schland (Germa	any)	
Region	Hess	en		
Working time			Sickness	
Working time		137:40 h	Sick days in month	0,00 days
Sickness	+		Sick days in year	0,00 days
Leav e	+	40:00 h		
		177:40 h	Leave	
Estimated working time	-	174:30 h	Leave in month	5,00 days
Overtime	+	3:10 h	Leave in year	10,00 days
Overtime starts at		0:00 h		
Overtime (corrected)	+	3:10 h		
Paid overtime	-	3:00 h	Leave entitlement	
Missing hour compensation	+		Leave entitlement	30,00 days
Remaining overtime	+	0:10 h	Leave in year	- 10,00 days
Overtime previous month	+	2:30 h	Leave carry forward	Begin of Januar
Overtime limitation		no regulation	Leave from previous year	+ 0,00 days
Overtime maximum			Remaining leav e expires	End of März
Total overtime	+	2:40 h	Remaining leave	20,00 days

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Employee overview and displaying the current working time models

Using the report "Employee Overview" the working time models of the employees can be printed out. Additionally one get an overview of the current remaining leave and the cumulated overtime of the employees.

That makes it easier searching for discrepancies regarding the working time models.

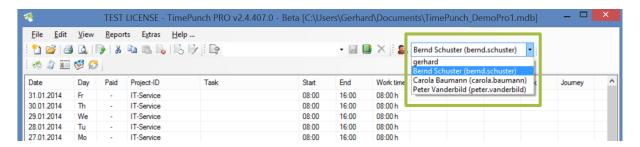
04.04.2015															
Month	2/2015														
staff member	Su.	Mo.	Tu.	We.	Th.	Fr.	Sa.	weekly hours	weekdays	Leave (year)	Taken Leave (year)	Taken Leave (month)	Remaining leave	Sickdays (year)	Overtin (month en
Emiliy Erdbeer	-	8:00	8:00	4:00	-	-	-	20:00	3	18,00	0,00	0,00	18,00	0,00	0,
Gerhard Stephan	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	30,00	0,00	0,00	n/a	0,00	п
Gemot Leuchturm	-	8:00	8:00	8:00	8:00	8:00	-	40:00	5	30,00	0,00	0,00	30,00	0,00	15,
Gustav A tes	-	8:00	8:00	8:00	8:00	8:00	-	40:00	5	30,00	0,00	0,00	30,00	0,00	0,
Hans Dampf	-	8:30	8:30	8:30	8:30	6:00	-	40:00	5	30,00	0,00	0,00	30,00	0,00	0,
Hans Krüger	-	8:00	8:00	8:00	8:00	8:00	-	40:00	5	30,00	5,00	5,00	25,00	7,00	5,
Jaqueline Wendt	-	8:00	8:30	8:30	8:30	6:00	-	39:30	5	30,00	10,00	0,00	20,00	0,00	2,
Jörn Mai	8:00	8:00	-	-	8:00	8:00	8:00	40:00	5	30,00	2,00	0,00	28,00	0,00	0,
Konrad Dabelow	-	8:00	8:00	8:00	8:00	-	-	32:00	4	24,00	0,00	0,00	24,00	0,00	0,
Maria Neufeld	-	8:30	8:30	8:30	8:30	6:00	-	40:00	5	30,00	5,00	0,00	25,00	0,00	0,
Paul Weis e	-	8:00	8:00	8:00	8:00	-	-	32:00	4	24,00	0,00	0,00	24,00	0,00	0,
Sven Schuster	-	8:30	8:30	8:30	8:30	6:00	-	40:00	5	30.00	0.00	0.00	30.00	0.00	0,

<u>Information</u>: For self-employed staff members no working-time-model is stored. This will be shown with an "n/a" (not applicable) in the employee overview.

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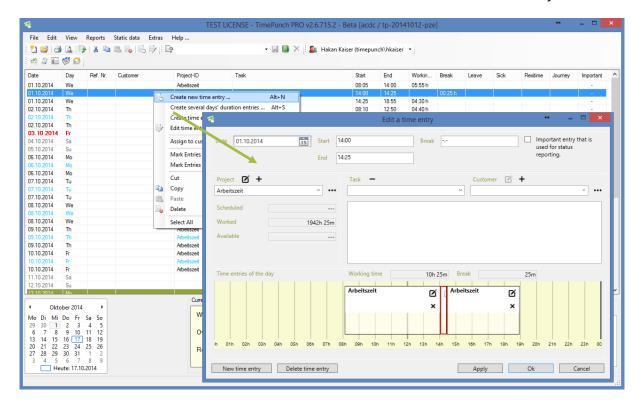
Enter new time-entries and edit existing

In order to amend the time-entries of a staff member, one has to select the member in the member list of TimePunch PRO.



Edit time-entries / create new one

With a double click to a time entry it can be modified. With a right click to it, it opens the context menu in which one can choose a command to create or edit a time entry.



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Differences: Time entry, several days' duration entries, time entry array

In TimePunch time entries can be created different ways. The menu offers three possibilities in order to create time entries.



Create new time entry

Using this feature a single time-entry can be created. The time entry starts and ends at the same day.

Create several days' duration entries

Several days' duration entries don't use a start or end time, but a daytime like morning, midday or evening.

The concrete start and end time will be taken from the working time model. This makes it easy to enter leave or sick times.

Certainly the start and end date can also be the same.

Create time entry array

A time entry array consists of time entries that repeat over the given time frame.

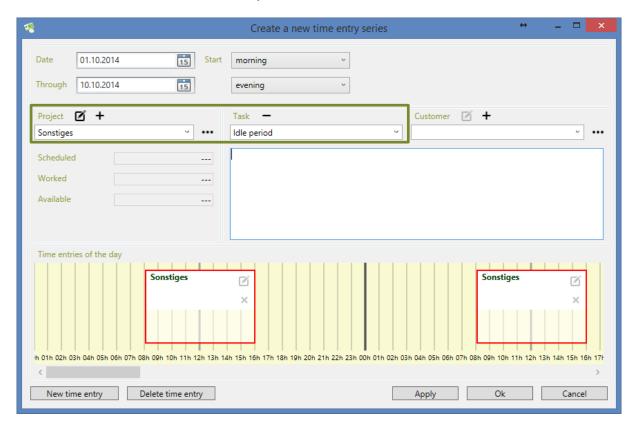
In opposite to the several days' duration entries, a concrete start and end-time must be set.

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Special case: employee starts in mid-month

TimePunch always takes the complete month in order to calculate the flexitime. If therefore an employee starts in mid-month the working time until the current start day has to be marked as "idle-period". This is necessary because otherwise the missing entries will be calculated as missing hours.

In order to create an idle-period one can create a new time-entry series. The default project "other" contains a task called "idle-period".



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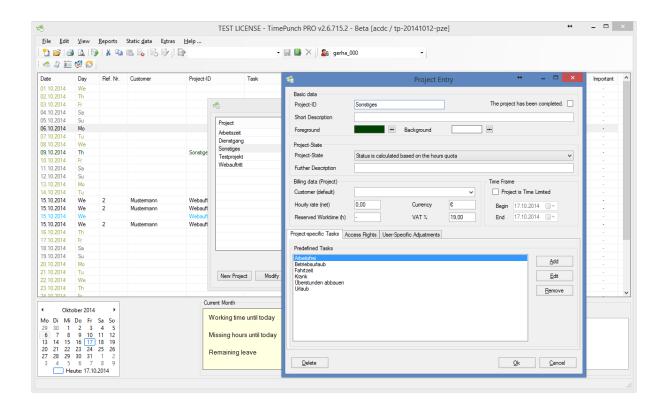
Additional special-cases that need manual entries

Manual entries (e.g. entries that cannot automatically recorded by the TimePunch Watcher or the RFID employee ID card) must be created for the following situations. Those entries must be entered by the staff member himself (if he/she has the proper permissions) or by the personnel-office.

Special-case	Description
idle period	Used mainly to define the time frame from beginning of the month until the beginning of an employee's work. If those entries are missing, the time will be recorded as absence time for the employee.
annual plant shutdown	The annual plant shutdown does not reduce the annual leave of the employee.
driving time	The driving time can be added to the working time depending on the employees TimePunch Profile. Without changing the profile the driving time will be summed up at its own.
sick	You can record the illness-related absenteeism with this type of entry.
overtime compensation	This entry is used to reduce overtime by holiday. With the help of this type of entry, the planned overtime can be logged.
leave	Holiday bookings will reduce the annual leave of the employee.

More entry types can be freely defined in the project dialog at "Master data / projects / other" with the help of the tasks.

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Time sheets

The time sheet can be printed out in two versions. The standard version with all columns used to print out at a Din A4 paper in landscape mode. And a short version that only contains the most important columns. This version is optimized for print out at Din A4 paper in portrait mode.

atum	Tag	Tätigkei	t	Projek	t-ID		Start	Ende	Sollzeit	Arbeit	Pause	Urlaub	Gen. U- Std.	Krank	Reise	
1.12.2013	3 So	Sonnta	g													
2.12.2013	3 Mo				Haue	nsteiner A	llee	07:30	16:00	08:00	08:30					
3.12.2013					-	nsteiner A		08:00	16:00	08:00	08:00					
1.12.2013	3 Mi	Krank				iges		08:00	16:00	08:00					08:00	
5.12.2013	2.2013 Do Krank		Sonst			08:00	16:00	08:00					08:00			
3.12.2013			-	nsteiner A	llee	08:00	16:00	08:00	08:00				00.00			
7.12.2013					Hauci	ilatellitei A	uice	00.00	10.00	00.00	00.00					
3.12.2013																
	_	Summa	y					00.00	40.00	00.00	00.00					
9.12.2013	$\overline{}$				_	nsteiner A		08:00	16:00	08:00	08:00					
).12.2013	$\overline{}$					nsteiner A		07:45	16:00	08:00	08:15					
1.12.2013					_	nsteiner A		08:00	16:00	08:00	08:00					
2.12.2013				_	nsteiner A		08:00	16:30	08:00	08:30						
3.12.2013	3 Fr				Haue	nsteiner A	llee	08:00	16:00	08:00	08:00					
	Stunden	nachw	eis vom 01.12.2013 bis 3	1.12.2013												
5.12.20								Datum (2.01.2014							
3.12.20	n-4		**************************************	Description		26-4		1 4-5-14		8:00	08:15					
7.12.20	Datum	Tag	Tätigkeit	Projekt-ID		Start	Ende	Arbeit	Pause	8:00	09:00					
3.12.20	01.12.2013 02.12.2013	So Mo	Sonntag	Ha uensteiner A	llee	07:30	16:00	08:30	_	8:00	08:00					
อ 12 20 ไ	03.12.2013			Hauensteiner A		08:00	16:00	08:00	+	8:00	09:00					
	04.12.2013		Krank	Sonstiges	viice	08:00	16:00	00.00	_	8:00	08:30					
	05.12.2013		Krank	Sonstiges		08:00	16:00	+	+	┨┞						
	06.12.2013	Br	TO SER	Ha uenstelner A	Allee	08:00	16:00	08:00	+	┨┞						
	07.12.2013	Sa	Samstag							8:00			08:00			
	08.12.2013	So	Sonntag							8:00			08:00			
	09.12.2013	Mo		Ha uenstelner Allee		08:00	16:00	08:00		8:00						
5.12.20	10.12.2013	DI		Ha uenstelner A	VIIee	07:45	16:00	08:15		8:00						
7 42 20	11.12.2013			Ha uenstelner Allee		08:00	16:00	08:00		8:00			08:00			
	12.12.2013			Ha uenstelner A		08:00	16:30	08:30		1 6.00			00.00			
9.12.20	13.12.2013 14.12.2013	Pr Sa	Consider	Ha uenstelner A	Allee	08:00	16:00	08:00	_	┨┝──						
7. 12.20	15.12.2013	So	Samstag Sonntag	_				-	_	┨┝──						
 	16.12.2013		Solillag	Ha uenstelner A	Alloo	07:45	16:00	08:15	_	┨┝						
	17.12.2013			Ha uenstelner A		08:00	17:00	09:00	_	┤ ┃						
	18.12.2013	M		Ha uenstelner A		08:00	16:00	08:00	 	11						
	19.12.2013	Do		Ha uenstelner A	Allee	07:00	16:00	09:00		11						
[]	20.12.2013	Fr		Hauensteiner A	Allee	08:00	16:30	08:30		11						
	21.12.2013	Sa	Samstag] [
	22.12.2013	So	Sonntag]						
	23.12.2013		Urlaub	Sonstiges		08:00	16:00			4 l						
	24.12.2013	_	Urlaub	Sonstiges		08:00	16:00			4 l						
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	27.12.2013	Do Br	Zweite r W eichna chtsfeiertag Urlau b	Sonstiges		08:00	16:00	+	1	 						
	28.12.2013	Sa	Samstag	Sundiged		00.00	10.00	+	+	1 l						
	29.12.2013	So	Sonntag					+	+	1 l						
	30.12.2013	Mo	Urlaub	Sonstiges		08:00	16:00	1		11						
	31.12.2013	DI	Urlaub	Sonstiges		08:00	16:00	1		11						
	Zusammer	fas sunç	1	•				108,00	0,00	1						

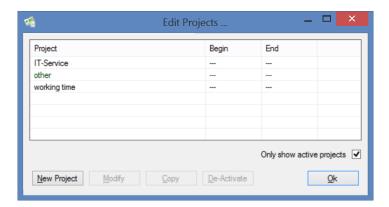
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Projects and tasks

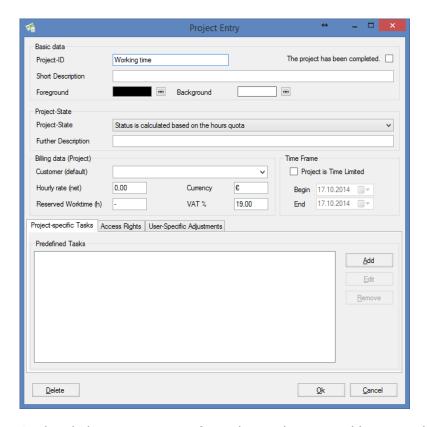
In TimePunch time entries can be applied to a project and a task. The following pages describes how to manage those in TimePunch.

Creating projects and edit

Using the menu item "Master data / projects" all defined projects will be shown. Inactive projects will be hidden by default, but can be shown by deactivating the checkbox "Only show active projects".



At this dialog new projects can be created and existing projects can be edited with a double click.

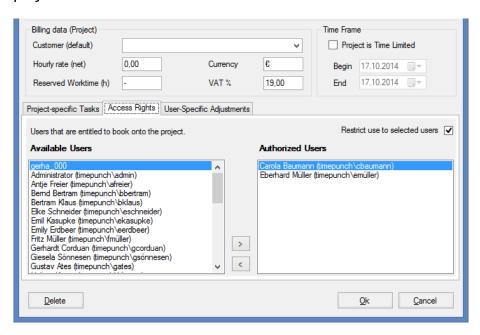


At this dialog project specific tasks can be created by using the "add" button.

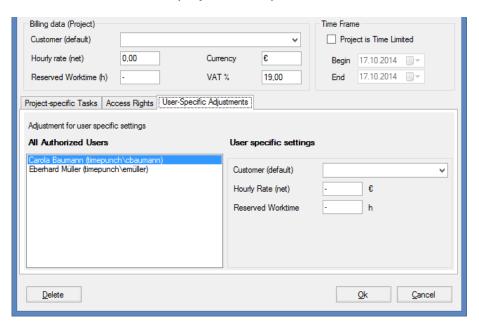
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Access rights and user specific adjustments

In order to keep the project list for the single project member clean, the access rights for projects can be handled at user level.



The same is also true for user specific adjustments. At this page the hourly work rate and the maximum amount of project hours per member can be defined.



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Project Budgets

For every project it's possible to define its own project budget within TimePunch. This defines the work time budget for the project pool and/or the single staff member.

Project pool

The project pool contains all staff members that are allowed to book on the project and which do not own an exclusive work time budget. That are all members for whom no time budget has been defined.

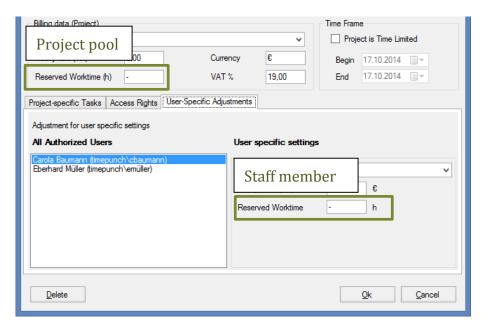
The work time budget that can be defined at the project dialog directly, is the maximum work time for the project pool. By default all employees share the same project budget.

Staff members

The work time budget for a single staff member can be defined at user specific adjustments. This work time budget is assigned to the staff member exclusively and can only be used by him or herself.

Total budget

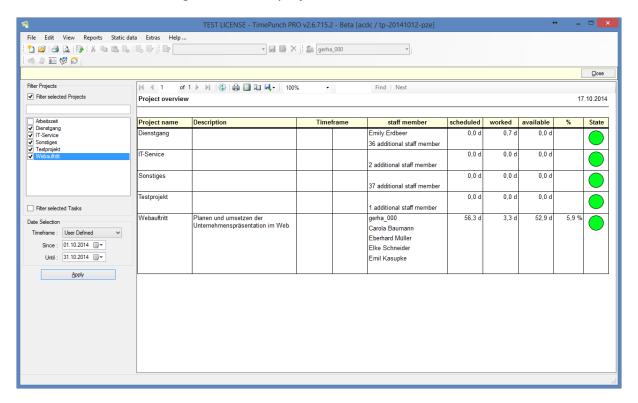
The total project budget is the combined project pool budget plus the work time of the staff members.



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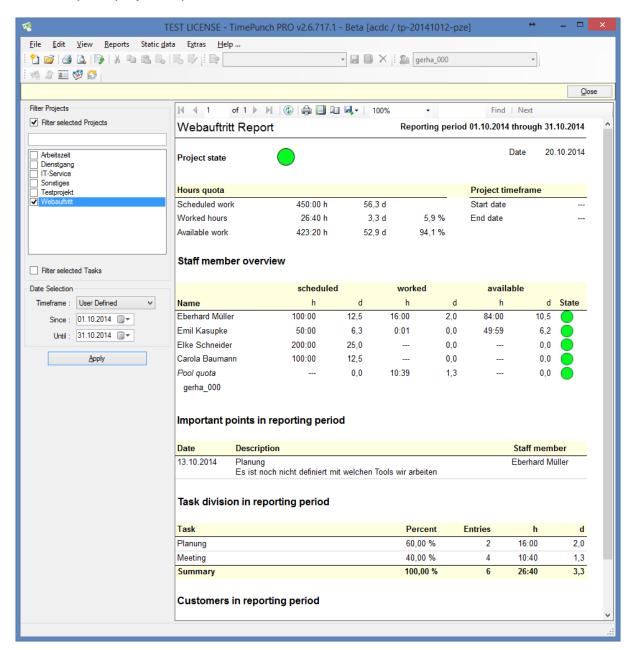
Project overview

The projects are evaluated on the report "Project overview" and "Project report". The project overview provides the status of all projects, the total number of hours, as well as an overview of the remaining hours of the project.



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A detailed report of all total hours and the hours worked during the reporting period are offered by the project report.



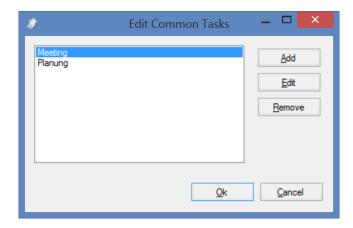
A very strong feature is the point "Important points in the reporting period". Here everyone simply can mark a time entry as important and thus is pinning the point on the project report.

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Common Tasks

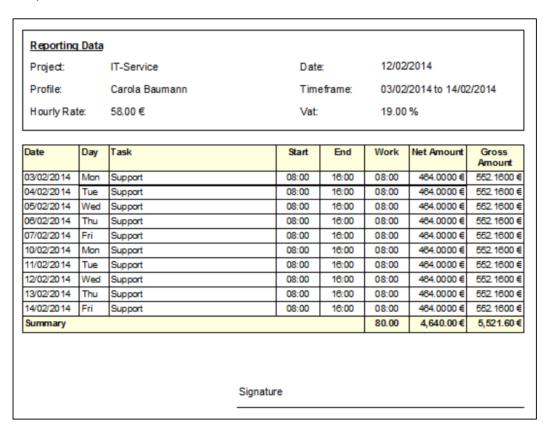
If tasks are used in every project, they can be treated as common tasks in TimePunch. Those tasks are useable in every project and therefore need not be created as a new task within the project.

Using the menu "Master data / Common Tasks" the following dialog will be shown.



Detailed Project Accounting

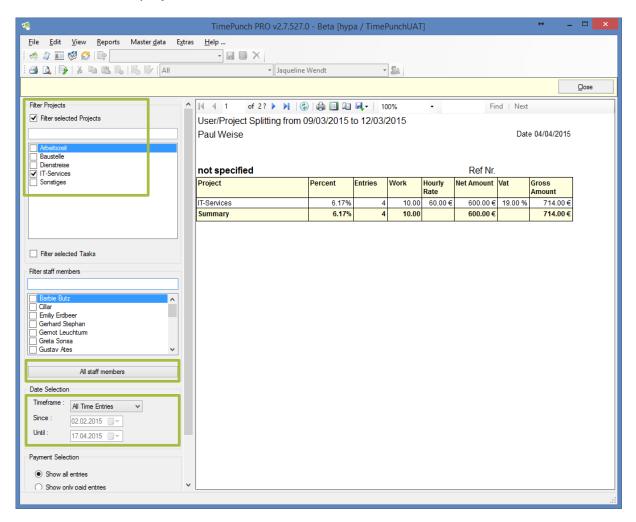
The report "Detailed Project Accounting" has been designed as a special report for users who need to show the project hours to their customer. The report can be accessed in menu "Reports".



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Project calculation

For helping the project office we developed the report 'Project accounting' and 'Project accounting per User'. Using this reports; one can evaluate how many hours in total have been booked for a project.



In order to show the complete project times, the following settings need to be set up.

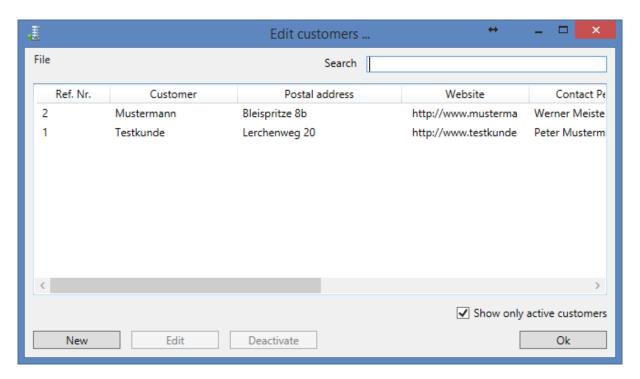
- No staff member must be selected. The easiest way to achieve that is to hit the button "All staff members".
- The Date Selection should be set to "All Time Entries" in order to get all project bookings that have been made so far.

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Customer management

TimePunch provides the ability to assign time entries to different customers. This allows a customized accounting of hours worked.

Therefor it's necessary to store the customer data in TimePunch. The customer data is maintained via the menu "Master data / customer".



Import and export customer data

Within the master data the customer can be imported and exported by using the menu called "File".

This happens mainly by importing and exporting CSV files. For the import it will be supposed that the first row contains the column title. The title defines the content of the column. The column order and completeness is not important as long the both mandatory fields "Ref. Nr." and "Customer" are filled.

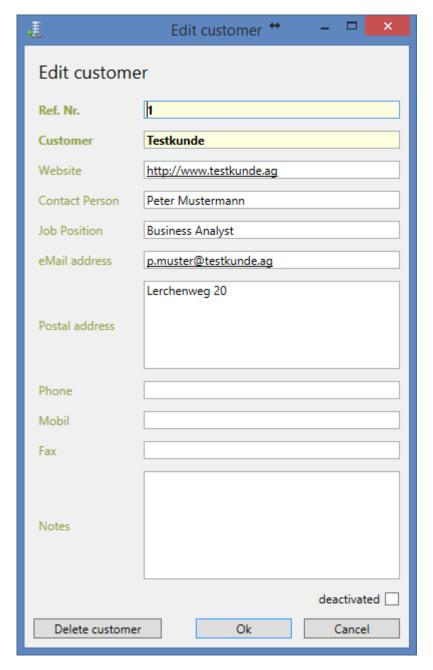
Hint: The easiest way to create an import template is to export a set of test data using "file / customers export" and save as CSV file.

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Manually create and edit customer data

Within the master data the customer data can be created with "New" and amended with the "Edit" button.

Both will open the following dialog where the customer data can be entered manually.



The mandatory fields "Ref. Nr." and "Customer" must be filled at least in order to store the customer.

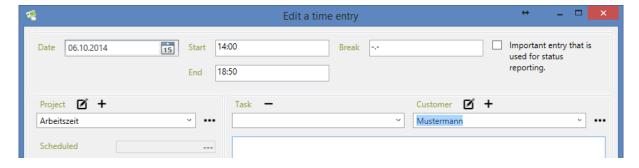
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Assign time entries to a customer

There are various ways to assign time entries to a customer.

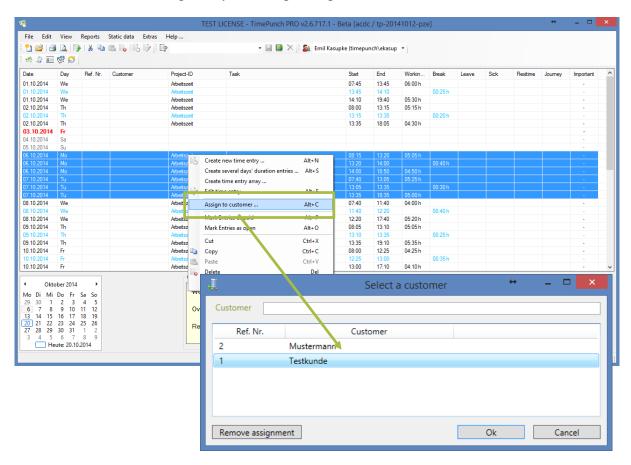
Assign a customer when editing a time entry

Within the edit dialog of a time entry, a customer can be assigned to the time entry.



Assign a customer to multiple time entries

To assign a customer to multiple entries, those entries must be marked in TimePunch. Then the customer can be assigned by choosing "Assign to customer" in the context menu.

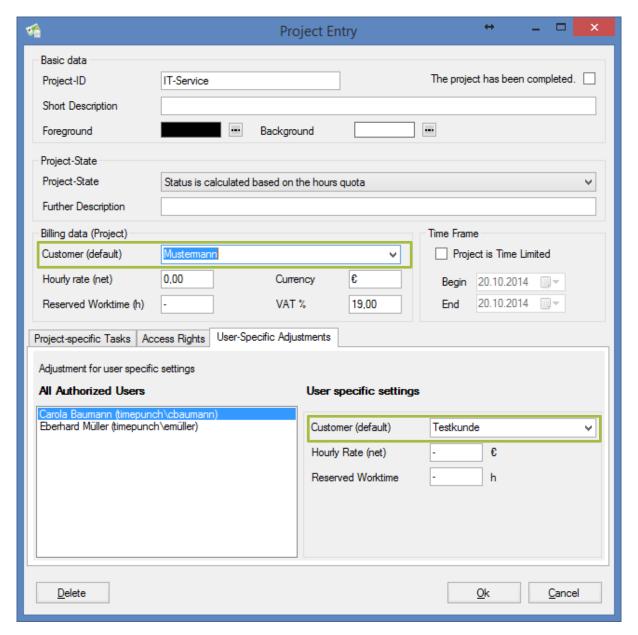


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Directly assign a customer to a project

In addition to the possible assignment of a customer after recording the time entry, a customer can also be assigned to a project directly in forehand.

This can be handled in the dialog to edit project (see project management)



This mapping can be adjusted later. However, it serves by default for new time entries.

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Flexi time calculation

At the following pages the flexitime calculation will be described. Also it will be shown how the calculation can be corrected, if needed.

Showing the current month data

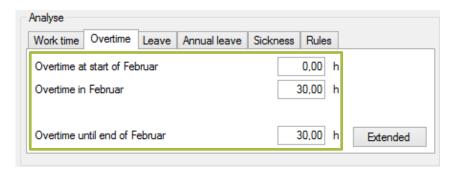
In the current month, the working time, the overtime and the remaining leave will be shown in a separate information window. This window is placed in the middle of the TimePunch Window at the lower border.



The working time will be displayed up to the current date. That is also true for the cumulated overtime. It's important to know that the displayed overtime includes the working time of the current day.

Analyzing the overtime in the current month

The overtime per user can be displayed in the analyze window (lower right). At this place the overtime at the beginning of the month, the overtime within the month and the overtime at the end of the month will be displayed.



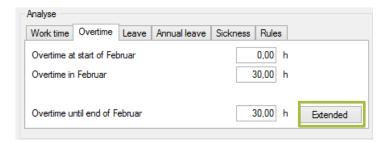
If a correction took place in form of overtime payment or overtime restriction, the original overtime and also the corrected overtime will be displayed.



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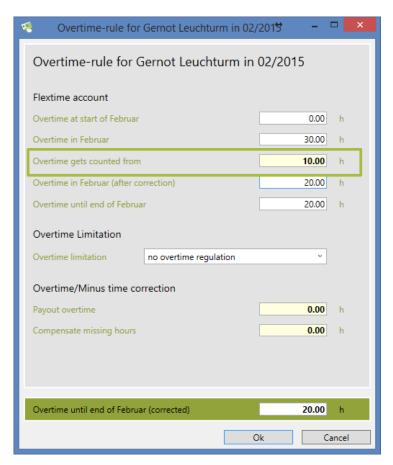
Manage the flexi time account

Additionally to the applied overtime rules of the given user Profile can be amended in every month separately. Using the button "extended" the overtime can be amended.



Overtime compensation with the working time contract

If the employment contract contains an overtime compensation, it can be defined by each month separately.

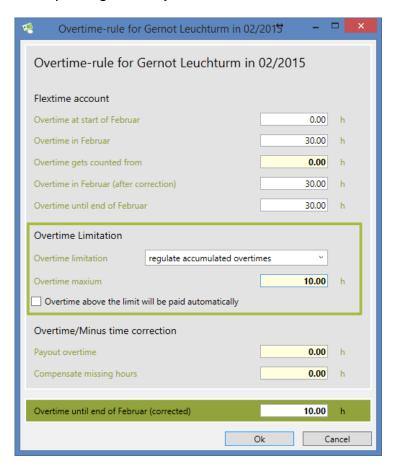


An overtime compensation means that the overtime is counted only from a certain number of hours as overtime work. Below this threshold, the overtime is compensated by the employment contract.

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Overtime limitation

In order to set an overtime limit, at the selection list "overtime limitation" the corresponding list entry needs to be chosen.



On request, the overtime can be limited per month or a total. This can be done with the second selection:

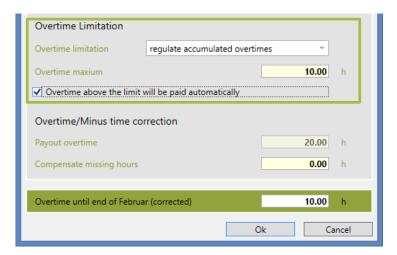
"Regulate accumulated overtimes" means that the employee can only have a limited overtime in total.

"Regulate monthly times only" means that the employee can only have a limited amount of overtime in month, but in total unlimited.

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Overtime gets paid automatically

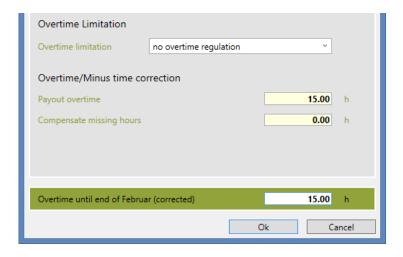
Overtime can be paid automatically, if overtime exceeds the set maximum number of overtime. This is to select the checkbox of the entry "Overtime above the limit will be paid automatically".



<u>Important</u>: Overtime can only paid out automatically, if an overtime limitation has been set in order to calculate the difference to it.

Pay-out overtime once and manually

Overtime can be paid out manually, by entering the overtime to be paid out in the field "Payout overtime". Similarly for compensating missing hours. One only has to enter the missing hours to compensate into the corresponding field.

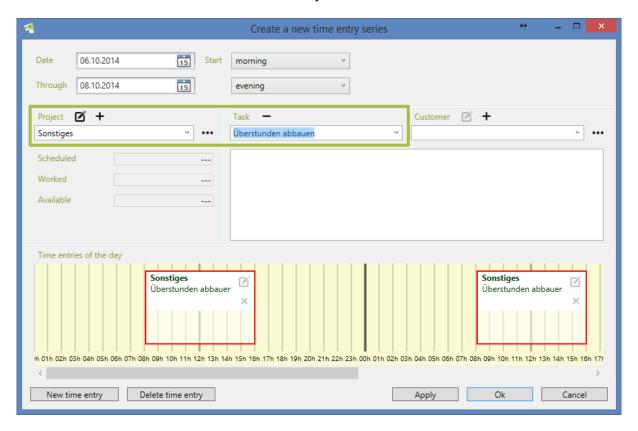


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Overtime compensation

The flexi time calculation in TimePunch interprets missing entries as taken-overtime. Seeing that adding an entry for overtime compensation is not necessary.

But for the clarity, adding entries for the compensated overtime is a good advice. Also in this case it's recommended to create an entry series.



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Evaluate the development of overtime

The buildup and reduction of overtime can be evaluated at best with the overtime report. In this report the target hours, the current working time and the therefore done and taken overtime displayed.

Overtime									
Overtime		+	3:10 h						
Overtime starts at				0:00 h					
Overtime (corrected)		+	3:10 h						
Paid ov ertime		_	3:00 h						
Missing hour compensation		+	Overtime limitation		n	no regulation			
_								"	o regulatio
Remaining o	vertime		+	0:10 h	Overtime maximum			-	
Overtime previous month		+	2:30 h	Total overtime		+	2:40		
Date	Day	Estimated	Sick	Leave	Work	Break	Overtime	Taken Overt.	Current
01/03/2015	Sun							010111	2:30
02/03/2015	Mon	8:00			8:20	0:40	0:20		2:50
03/03/2015	Tue	8:30			8:25	0:30		0:04	2:45
04/03/2015	Wed	8:30			9:00	0:30	0:30		3:15
05/03/2015	Thu	8:30			8:30	0:30			3:15
06/03/2015	Fri	6:00			6:00	0:30			3:15
07/03/2015	Sat								3:15
08/03/2015	Sun								3:15
09/03/2015	Mon	8:00			8:30	0:30	0:30		3:45
10/03/2015	Tue	8:30			8:30	0:30			3:45
11/03/2015	Wed	8:30			8:50	0:30	0:20		4:05
12/03/2015	Thu	8:30			8:30	0:30			4:05
13/03/2015	Fri	6:00			6:00	0:30			4:05
14/03/2015	Sat								4:05
15/03/2015	Sun								4:05
16/03/2015	Mon	8:00			8:35	0:35	0:35		4:40
17/03/2015	Tue	8:30			8:30	0:30			4:40
18/03/2015	Wed	8:30			8:30	0:30			4:40
19/03/2015	Thu	8:30			8:30	0:30			4:40
20/03/2015	Fri	6:00			6:00	0:30			4:40
21/03/2015	Sat								4:40
22/03/2015	Sun								4:40
23/03/2015	Mon	8:00		8:30			0:30		5:10
24/03/2015	Tue	8:30		8:30					5:10

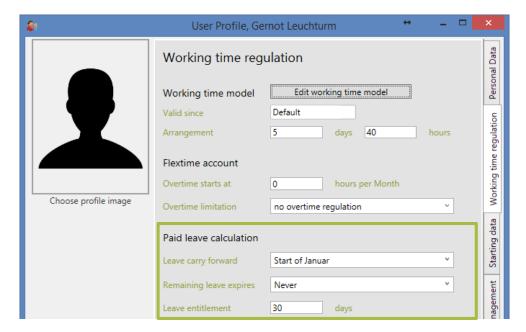
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Annual leave management

The following pages describes how the annual leave can be managed and evaluated using TimePunch.

Set-up the leave account for the first time

If one create a new TimePunch profile for a new member, the annual leave (as defined in the contract) must be entered in TimePunch.



If the employee starts in the mid of the year, the remaining-leave must be entered at the starting data section.

The same also applies to the introduction of TimePunch. At the "starting data" section the amount of holidays should be entered, which the user has available at the start of using TimePunch.

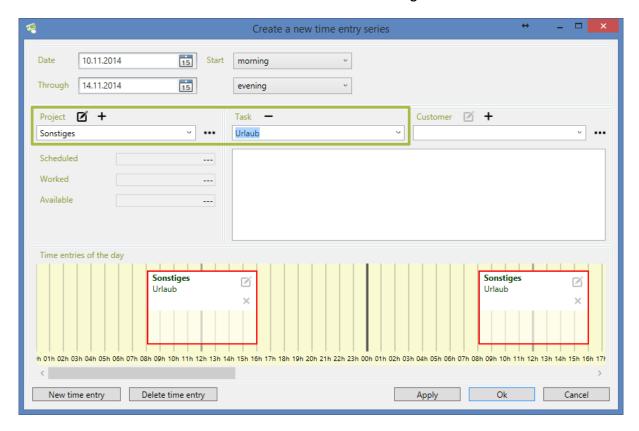


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How to enter annual leave

In order to enter annual leave, choose 'Edit, Create several days' duration entries ...' from the menu and select 'Leave' to specify the entry.

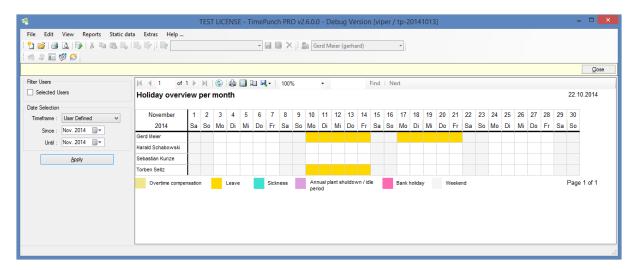
The fields 'start' and 'end' specify the day time where the entry starts and ends. The concrete start and end times will be taken from the working time model.



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Holiday planning

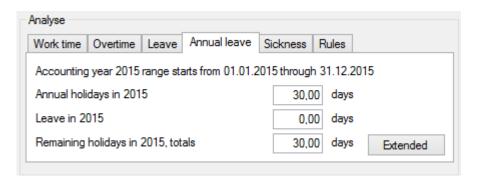
TimePunch offers the "Holiday planning" report for the easy planning of annual leave. In this report, each employee can see the registered holiday times and print it out. Overlapping times are directly visible and can be corrected.



Take remaining leave into the upcoming year

The remaining holiday is automatically transferred into the New Year. Therefore the last month before the month, which was designated as vacation carryover in the profile, is crucial.

The current holiday annual leave can be viewed in the register.



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By using the button "Extended" the annual leave can be adjusted for the accounting year.



For the current booking year, the month that shall be used to carryover the holiday, can be set. Additionally the yearly amount of leave can be entered.

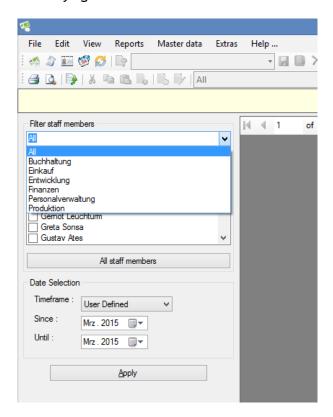
If remaining days from the previous year are taken over, it is possible to set an expiration date. The expiration date defines until when the vacation of the previous year must be taken. If the staff does not take the remaining leave until this expiration date, it expires. Then the staff member only owns the annual leave of the current accounting year.

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Teams, Departments and Branches

For a better clarity and staff management, the employees can be grouped in TimePunch. Therefore three layers of groups are supported. That are teams, departments and branches.

Each Group (e.g. team, department and branch) must have a group leader. The group leader owns independent from their actual permission the right to access the working time reports of their group members. That means a read only access to the working times of the members is always given.



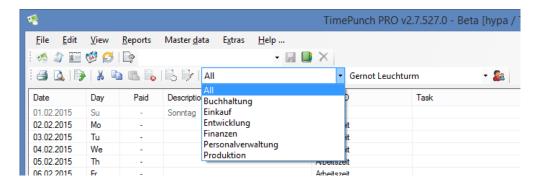
Additionally the group leader and their assistants can be set the Authorization for Human Resource Management.



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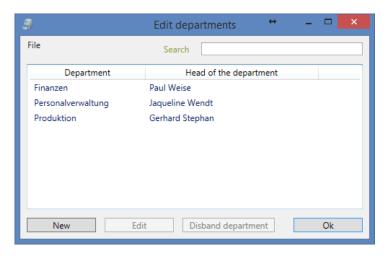
In this case the group leader or their assistants have the right to manage the working times of the group members.

The groups that the group leader can access, are displayed beside the staff member selection in TimePunch.



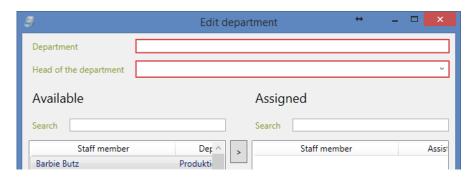
Manually create and edit groups

Teams, departments and branches are managed at the menu "master data" in TimePunch. Only the administrator of TimePunch can manage groups, add and remove group members.



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A new group can be added with click at the button "new"

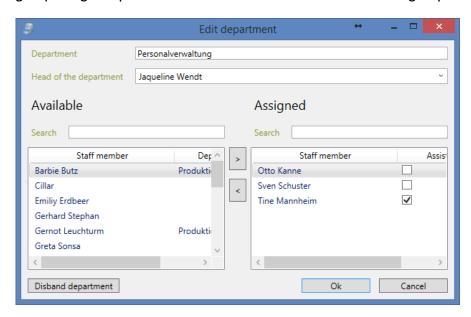


For each group a name and the group leader (at this place head of the department) needs to be defined. Furthermore group members can be assigned as assistants of the group leader.

<u>Important:</u> The group leader don't need to be a member of the group, but the selected assistants need to be. So it can be secured, that one staff member can own the leadership of distinct groups.

The group leader always owns the right to display the working time reports of the group members. But only with the authorization "Human resource management" the working times of the group members can be changed by the group leader.

By using the menu "master data" and the sub items teams, departments and branches the group list gets opened. With a click to the button "Edit" the group assignment can be edited.



It's important to know that in one group layer a staff member can only assigned to one specific group. Each staff member can be assigned to one team, one department and one branch.

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Import and export group assignments

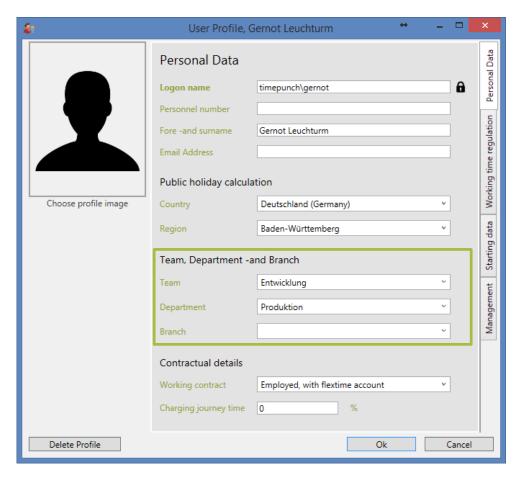
Within the master data the group assignments can be imported and exported by using the menu called "File".

This happens mainly by importing and exporting CSV files. For the import it will be supposed that the first row contains the column title. The title defines the content of the column. The column order and completeness is not important as long the both mandatory fields "Name" and "Staff member" are filled.

Hint: The easiest way to create an import template is to export a set of test data using "file / export department assignments" and save as CSV file.

Assign staff member profiles directly to a group

At the TimePunch profile dialog, the employee can be assigned directly the respective team, the department and the branch. This is easier in many cases because the employee can be managed holistically.



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Reporting

The following pages describe the reporting functionality of TimePunch.

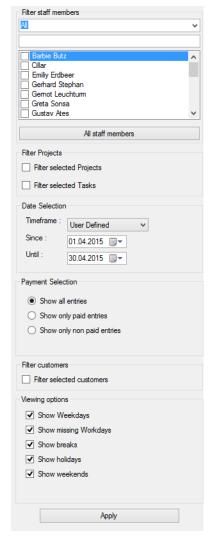
Menu "Reports", Reporting Options

For each report there are different filters available. This filters won't change the look, but the data that is displayed.

If the account owns administration rights, it is possible to create reports for all user accounts. For most reports it's also possible to filter projects and tasks, as well as the reporting time frame.

Additionally there is an option called "Payment Selection" with that only paid entries or non-paid entries can be filtered.

After applying the settings the report will be recreated by using the new filter settings.



Report export

Each report can be exported as an Excel, PDF or Word file.

Microsoft Excel has been established as a standard export. Therefore there's an direct export for excel implemented in

TimePunch, with that the report gets directly opened within a new Instance of Microsoft Excel.



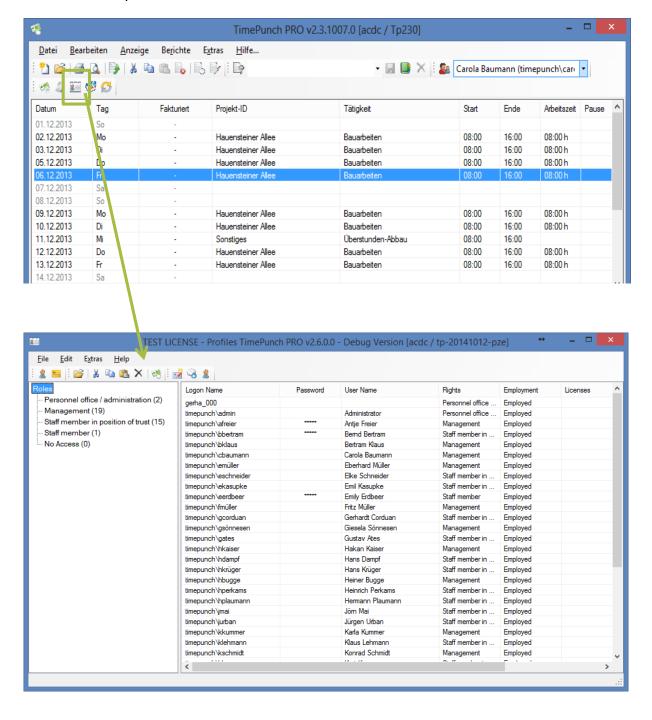
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Permission management

The following pages describe the permission management in TimePunch PRO.

TimePunch Profiles

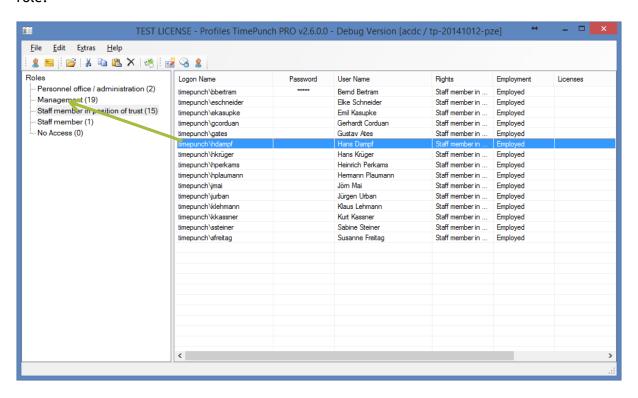
Using the software "TimePunch Profiles" staff members can be assigned to different roles and associated permissions.



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Assigning staff members to a role

Move a staff member via drag & drop to a different role in order to assign the user to that role.



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Permissions

As a standard every installation owns administration rights. If TimePunch gets installed in an enterprise environment, each user can be assigned to a different role. The role defines the permissions that the user owns.

Login Permissions	Administra- tion	Human Resource manage- ment	Project- Manage- ment	Staff member in position of trust	Staff member
Login	х	x	х	х	x
Manage TimePunch Profiles (switch users)	x	x			
Administrative Tasks	х				
Synchronisation					
Access to the Synchronization Wizard of TimePunch	х	х	х	х	
Time recording					
Access to the TimePunch Watcher	х	х	х	х	х
Change active time entry	х	x	x	x	
Change recording settings	х	x	x	x	
Project access					
Access to the active projects	х	х	х	х	х
Managing the projects	х	x	x		
Send projects using the TimePunch Sync Wizard	х	x	x	х	
Receive projects via TimePunch Sync Wizard	х	х	х		

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Access project reports	х	х	x		
Access financial details	х	x			
Task access					
Access to the active tasks	х	x	x	х	x
Managing the common tasks	х	x	x		
Time entries					
Access to the time entries	х	х	х	х	х
Modify existing time entries	х	х	х	x	
Send time entries using the TimePunch Sync Wizard	x	х	x	х	
Receive time entries using the TimePunch Sync Wizard	х	х	х	x 1	
Restricted modification of existing time entries.					x
Flexi time / Annual leave					
Manage flexi time and annual leave	х	x	х	х	х
Report flexi time account	х	x			
Display monthly flexi time	х	х	х	х	х
Manage monthly flexi time	х	x	x		

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 $^{^{\}rm 1}$ Sofern dabei keine Projekte oder Tätigkeiten verändert oder angelegt werden.

Customer management					
Access customer data	x	x	x	x	x
Manage customer data	x	x	х	x	х
Export customer data	x	x	х		
Import customer data	x	х	х		
Working time models					
Display working time models	х	х	х	х	х
Manage working time models	x	х	х		
Teams / Departments / Branches					
Access groups	x	x	x	х	х
Manage groups	x				
Export groups	x	х	х		
Import groups	x				
Public holidays					
Access public holidays	х	х	х	х	х
Manage public holidays	х	х			
Export public holidays	x				

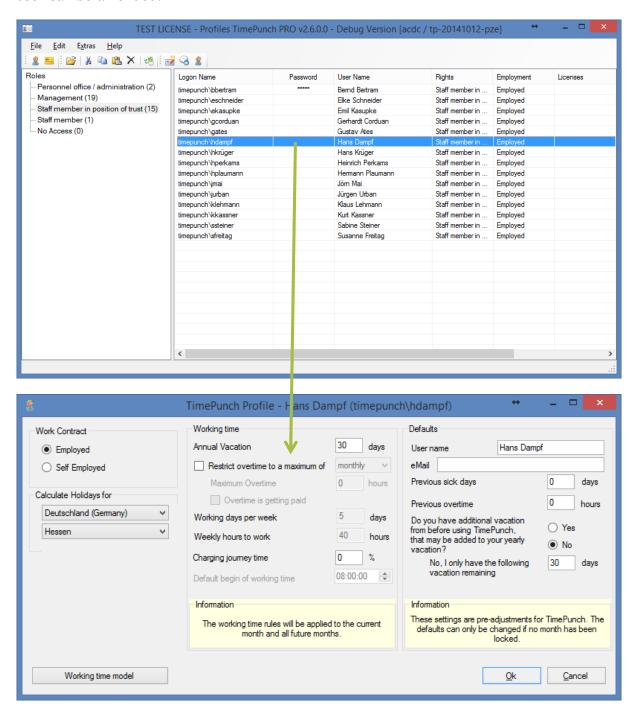
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Public time entry filter					
Access public time entry filter	х	x	х	x	х
Manage public time entry filter	x	x	х		
Staff member profiles					
Access staff member profiles	х	x	x	x	x
Manage staff member profiles	х	x			
Export staff member profiles	х	x			
Import staff member profiles	х				
Authorization role					
Access authorization	х	x	х	х	x
Authorize staff member	x				
Password management					
Manage passwords	х	х	х	x	х
Reset passwords	х				

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Amending employee profiles in TimePunch Profiles

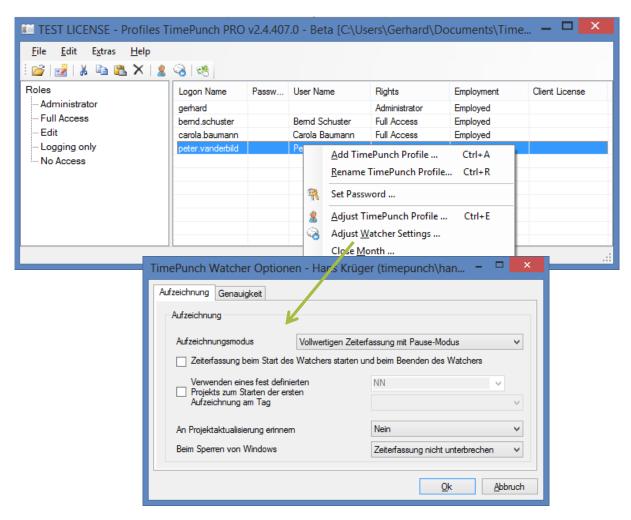
With double clicking the staff member in TimePunch Profiles the employee profile of this user can be amended.



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Amending the recording settings

In TimePunch Profiles the recording settings can be managed centralized for all users. This can be done with a right click onto the user profile. After that the menu "Adjust Watcher Settings ..." has to be chosen.



The different recording options are described in detail within the user manual of TimePunch Watcher.

But it's important to know, that the settings can be managed centralized. Because if a user only owns the right to record only times, he can't change those settings.

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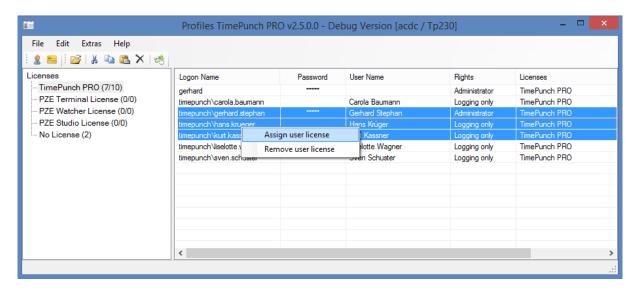
Quitting of employees

If employees are leaving the enterprise they cannot be deleted in TimePunch due to their existing time entries.

And even if it would be possible, deleting the time entries is not recommended because the times may needed in the future. Because of this reason the times of employees who left the enterprise can be archived.

For this purpose, the employee is first moved to the role of "No Access". Now a change to the license management is necessary.

Here the appropriate license type is selected first in the tree, e.g. "PZE Studio". Then the license for the selected staff can be removed with the right button context menu "Remove user license".



The license is now again vacant and available for new employees.

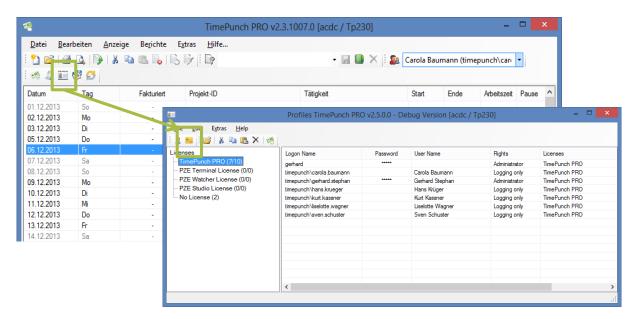
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License management

The following pages describe the TimePunch PRO license management.

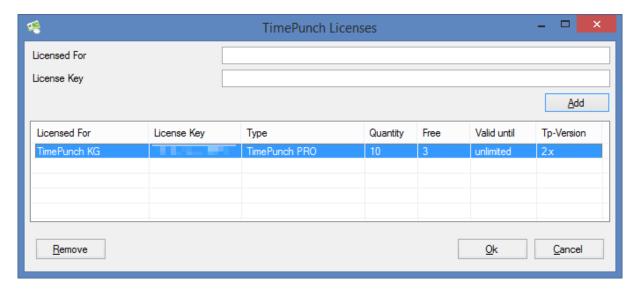
TimePunch Profiles

Using "TimePunch Profiles" the licenses for TimePunch PRO can be entered and assigned to the staff members.



Enter the license key

Before licenses can be mapped to the individual employees, the license key must be entered. This is done via the menu item "Help / Enter license information ..."

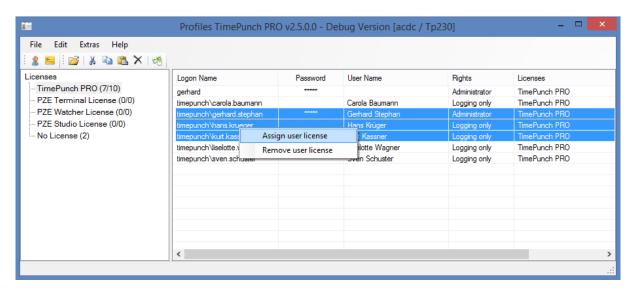


After entering the license information, the key must be added by using the "Add" button.

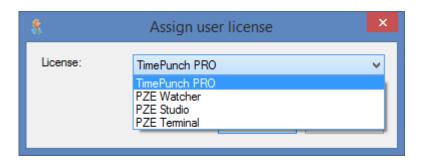
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Assign licenses to the employees

In the tree, the number of licenses already awarded, as well as the number of all license keys of each type are displayed for the respective license type.



Now the concerning employees must be selected and the context menu "assign user license" chosen.



After confirming the dialog with OK, the license gets assigned to the employee. As an alternative to licensing through the Dialog, the employee can also be moved via drag and drop on the appropriate license in the tree view.

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Types of licenses in TimePunch

Additionally to the kind of licenses in TimePunch there are different types of licenses available. This types allow access to the complete system or only to part aspects.

TimePunch PRO

This license is a version that is required in the human resources department to evaluate the working hours of employees. The TimePunch PRO license offers an efficient staff management including vacation planning, flexitime accounts / overtime management, monthly reports, and extensive project management functions.

Alternatively this license can be used also for each employee for time recording, since it includes all PZE licenses (Terminal/Watcher/Studio).

PZE Watcher

This license includes the use of the TimePunch Watcher to record the working time on your own PC. No time attendance terminal is required for this license.

The time is recorded as soon as the employee logs on to his workstation PC. In addition, the working time can be booked on various projects. The number of licenses is dependent on the number of employees. The time-evaluation will be done with the TimePunch PRO license in the personnel office or project management.

PZE Studio

This license includes the use of TimePunch Studio to record the work time at a community PC, e.g. in a garage, a practice or in a Studio. For each employee an own PZE Studio license is required.

The working time is recorded when the staff member logs on in TimePunch Studio. In addition, the working time can be booked on various projects. The number of licenses is determined by the number of employees. The time-evaluation will be done with the TimePunch PRO license in the personnel office or project management.

PZE Terminal

Only the Coming and the Going of staff members is recorded at the time recording terminal, either via RFID employee ID cards or keychain. The number of licenses is dependent on the number of employees. The time-evaluation will be done with the TimePunch PRO license in the personnel office.

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License matrix

The following table shows the various licenses and their use and licensing opportunities.

Usage	TimePunch PRO	PZE Watcher	PZE Studio	PZE Terminal
TimePunch PRO Windows Client	х			
TimePunch Watcher	х	X		
TimePunch Studio	Х		x	
TimePunch time recording terminal	х			Х

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Tips and Tricks

The following pages contains useful tips and tricks that can ease the work with TimePunch.

Month end closing and overall performance

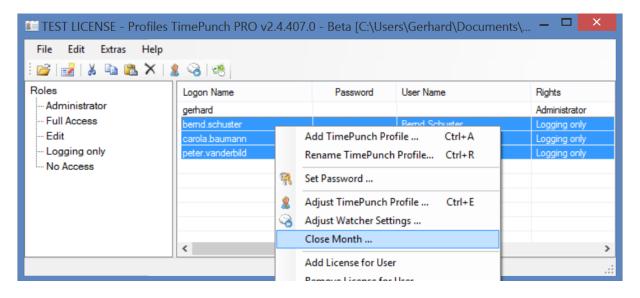
The month end closing that can be done in TimePunch has to big benefits. First it prevents deleting previous recorded time-entry accidentally, because they get locked. Second it keeps the performance of TimePunch at a good level, because the times are set and there's no need for a recalculation.

Because of this reasons the month end closing should be done on a regular base, either by the staff member for their own times, or by the personnel office for all staff.

In TimePunch PRO the month end closing can be executed in menu 'Extras / Month-end closing'.



The personnel office can open the month-end closing dialog for multiple users by selecting the users and choosing 'Month-end closing' from the context menu.

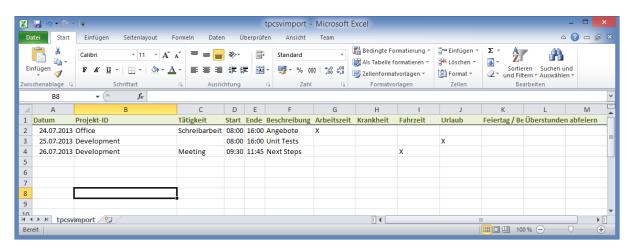


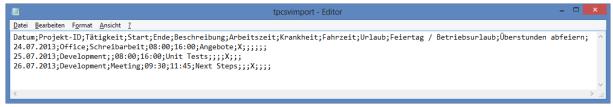
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Import of time entries from Microsoft Excel

Using the command line tool 'TpCommand' it is possible to import excel files that have been created with a defined set of columns.

How this can be achieved is described in detail within the user manual of TimePunch Command. At this place we only want to tell you that it is possible in case you need it to import time entries from previous time entry recording systems.



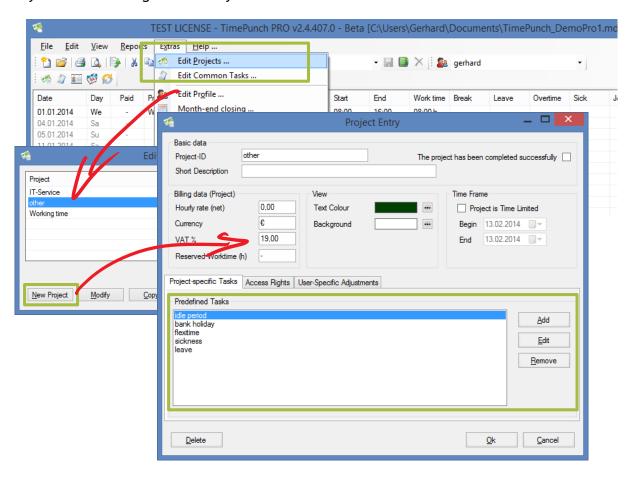


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Standard project for leave, sickness, taken overtime etc.

Using the menu "Master data / Edit projects" it's useful to create a standard project called "other". This project can contain some default tasks like 'leave', 'sickness', 'taken overtime' etc.

Starting with TimePunch 2.4 this standard project called 'other' will be created by default. If you want to change the tasks you are free to do so.



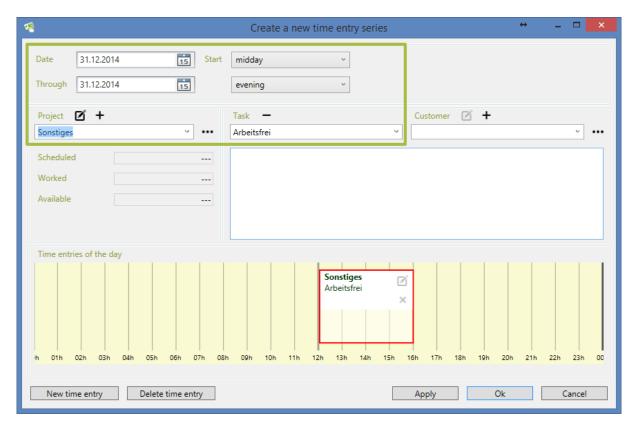
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Christmas and Sylvester

Christmas and Sylvester are no official public holidays, but most enterprises offer their employees a half day off.

Solution 1: Employees will work a half day at Christmas and Sylvester

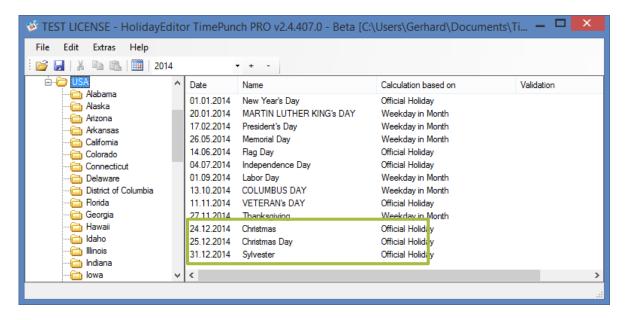
If this is the same for your enterprise, you have to add such "half" public holidays for each user, in order to correct the flexitime account.



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Solution 2: Christmas and Sylvester treated as normal leave days

In this case Christmas and Sylvester can be added as a bank holiday within the holiday editor. Accordingly to that, the employees' annual leave must be reduced by 2 days in order to reflect the additional holidays.



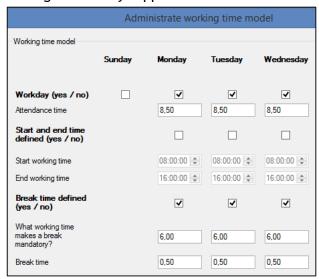
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Automatic time-recording without possibility to manipulate

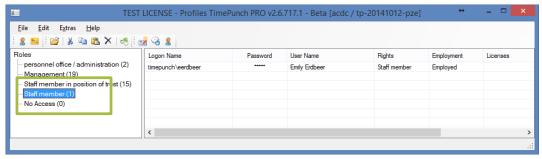
By knowing how to set up TimePunch it is possible to configure it in a way, that no the staff member can't manipulate the recorded working time.

The following steps are necessary:

1. The working time model of the staff member should contain an automatic break of 30 minutes after 6 hours. With that setting can be ensured, that the break time settings are always applied.



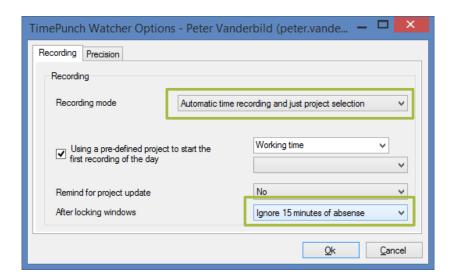
2. As a second the staff member should only have the right to record the working time. With this setting it can be ensured that the working times cannot be amended.



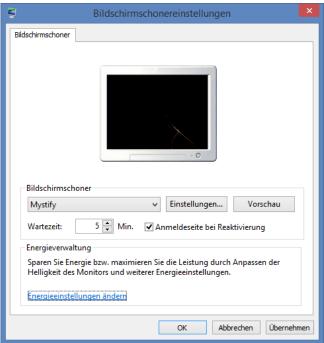
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3. Additionally the recording options should be set in a way that the staff member cannot stop the time recording. This prevents a wilful stopping of the recording.

Another important point is that the time recording shall be stopped when windows get locked. In order not to track each short break (e.g. toilette) it's recommended to enter 15 minutes fairness time.



4. In order to make the setting "after locking windows pause time recording" work, the screen saver must be configured accordingly. This can also be done via the domain settings for all domain users.



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End of the Document

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